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Central Intelligence Agency



Washington, D.C. 20505

6 April 1983

MEMORANDUM FOR: Thomas Jones
Division of Ferrous Metals
U.S. Bureau of Mines

SUBJECT : Soviet Manganese: Reserves, Production and
Trade

In response to your recent request, we are forwarding information on Soviet reserves, production, and trade of manganese. If you have additional questions on this or any related matter, we will be happy to assist.


Chief
Industry and Transportation Branch
Soviet Economy Division

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Attachments:
As Stated Above

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SUBJECT: Soviet Manganese: Reserves, Production and Trade

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Reserves

The USSR has the world's largest reserves of manganese. According to Soviet geological studies, reserves (corresponding to Western concepts of proven and probable) amounted to about 2.5 billion tons in the mid-1970s, some 40 percent of the world's total, and enough to support current Soviet mine production far well over two centuries. Other Soviet studies indicate that reserves (corresponding to Western concepts of indicated and possible) could be as much as 5 to 7 billion tons.

The bulk of Soviet manganese reserves are located at Nikopol in the Ukrainian SSR and at Chiatura in the Georgian SSR. These deposits are located in accessible regions of the Western SSR and do not pose serious exploitation problems in terms of climate or distances to industrial centers.

Production

The USSR is the world's largest producer of manganese. Production amounted to about 9.5 million tons in 1982. (Table 1) Although production was down from the peak of 10.2 million tons posted in 1979, output in 1982 was still more than double that of South Africa, the world's second largest producer.

The Soviets recently commissioned a new manganese mine at the huge Chiatura deposit, roughly 60 miles northwest of the city of Tbilisi. This mine will have an annual capacity of 1.5 million tons per year. Another mine was brought onstream at the Bolshoye Tomakskoye deposit, some 100 miles west of the city of Zaporozh'ye. Production at this mine will amount to about 1 million tons per annum. We believe that Soviet manganese production will increase from about 9.5 million tons in 1982 to perhaps 11 million tons by the late-1980s.

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Table 1: Soviet Production of Manganese 1965-1982
(000 tons)

	<u>Raw Ore</u>	<u>Metal Content</u>
1965	7576	2485
1970	6841	2446
1975	8459	2951
1976	8636	2992
1977	8595	2964
1978	9057	2945
1979	10244	3162
1980	9750	3040
1981	9150	2761
1982	9500	2850

Source: Data taken from various issues of Narodnoye Khozyaystvo (The Soviet Statistical Yearbook). Data for 1982 are estimated.

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Trade

The Soviet have exported manganese for many years but never have sent significant amounts to the West. Annual Soviet exports fluctuated between 1.0 to 1.5 million tons during 1965-81 (see Table 2). Sales to non-Communist countries fell from about 400,000 tons in 1970 to about 125,000 tons in 1977 and have virtually been eliminated since. In no year have the Soviets ever accounted for more than 2 percent of non-Communist countries' imports of manganese. Moreover, non-Communist demand for Soviet manganese weakened during the 1970s because of sharply increased availability at more attractive prices, most notably from South Africa and, to a lesser extent, Gabon. We anticipate that the Soviets will account for only a marginal share of Western manganese supply for the foreseeable future [redacted]

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The Soviets have also been exporters of ferro-manganese for many years. Annual sales ranged between 100,000 to 150,000 tons during 1965-80. Sweden, Finland and Austria normally account for about one-half of annual Soviet sales. Hungary and Romania account for most of the remainder. As with manganese ore, we anticipate little increase in Soviet exports of ferro-manganese to the West for the foreseeable future [redacted]

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Table 2

USSR: Exports of Manganese Ore 1965-81

(ooo metric tons)

	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
Total	1020	1218	1250	1150	1200	1217	1400	1300	1300	1482	1411	1342	1352	1186	1317	1255	1194
Bulgaria	--	--	--	--	97	80	110	102	108	130	128	127	108	78	103	125	117
East Germany	171	198	216	108	177	175	193	172	165	150	179	185	186	170	182	135	130
Poland	249	317	304	318	364	365	360	417	465	495	484	482	502	446	518	490	493
Czechoslovakia	141	149	186	177	150	153	252	265	331	329	341	356	320	373	423	397	372
Yugoslavia	--	--	--	--	--	31	25	23	19	26	30	26	34	17	27	36	38
North Korea	--	--	--	--	--	21	20	21	21	21	20	20	11	21	21	29	15
Sweden	27	26	30	26	37	47	47	40	17	37	26	18	5	--	--	--	--
Japan	92	106	100	107	50	96	111	96	38	194	112	75	119	19	--	--	--
Norway	--	--	--	40	37	26	10	52	65	57	57	5	--	--	--	--	--
U.K.	122	134	104	71	44	42	27	12	14	--	--	--	--	--	--	--	--
West Germany	27	21	--	29	16	43	--	--	--	--	--	--	--	--	--	--	--
France	90	116	65	99	89	109	99	93	9	--	--	--	--	--	--	--	--
Italy	8	7	--	--	--	18	3	--	--	--	--	--	--	--	--	--	--
Other	93	144	245	175	139	--	127	48	61	35	15	48	67	62	43	53	29

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